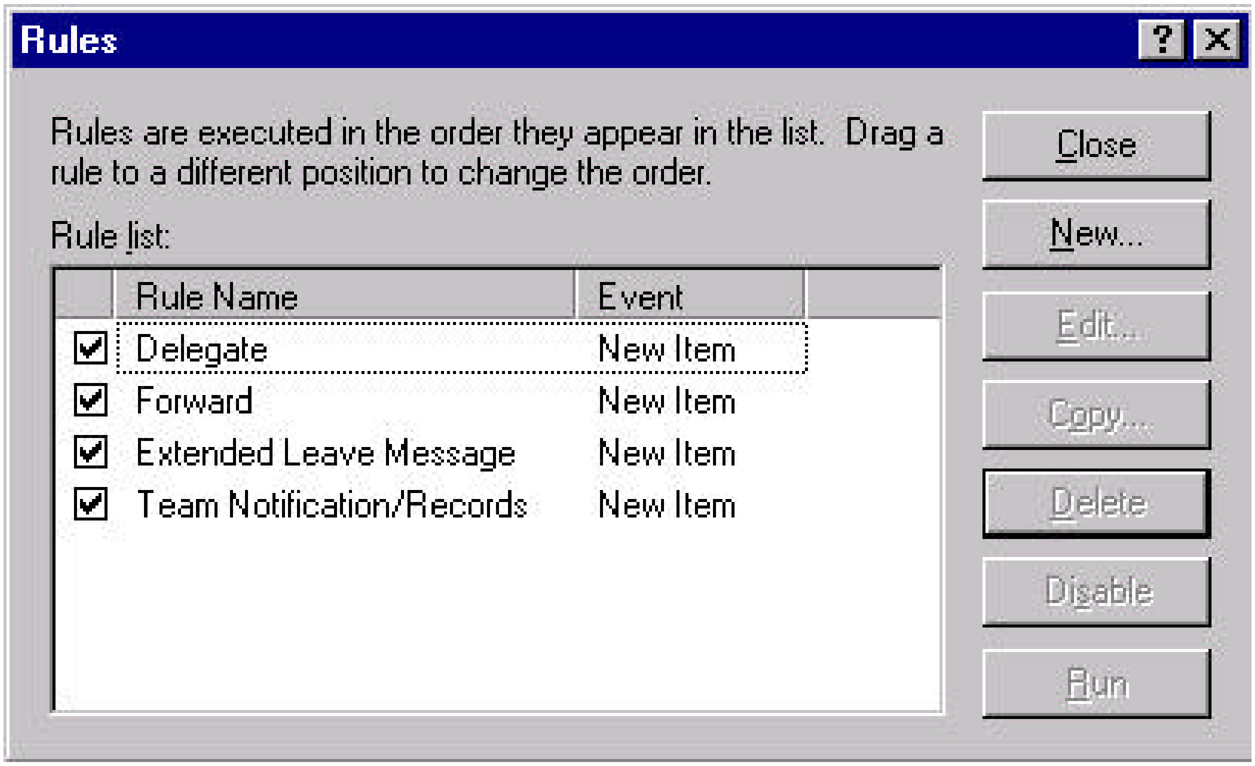
Using GroupWise Rules


Rules
?
Close
New...
Edit...
Copy...
Delete
Disable
Run

Rules are executed in the order they appear in the list. Drag a rule to a different position to change the order.

Rule list:

	Rule Name	Event
☑	Delegate	New Item
☑	Forward	New Item
☑	Extended Leave Message	New Item
☑	Team Notification/Records	New Item

EUC Technical Training

Rules

GroupWise Rules are a tool that can be used to automate many actions for the user. They can be configured to send a Reply, Forward or Delegate items to other recipients. They can also be used to Filter, Sort, and even Delete unwanted messages. There are many different ways that Rules can be configured to perform these tasks. For the user that wants easy examples to follow, we will be examining two ways of setting up an Extended Leave Message with a Reply. For the user who feels they need more, there are also examples of Rules that will Forward/Delegate and Filter messages as well as, more advanced information on the How Rules Work page.

Contact your local office ITT if you have any
difficulties configuring Rules in GroupWise.

Extended Leave Message with a Reply

The most commonly used Rule (and one of the most dangerous) is one that sends a Reply. This is most often used along with Extended Leave Messages. This Rule will send a predetermined Reply to the originator (e.g. I am out of the office until 7/21/2001). In the past, users configuring their Extended Leave Messages incorrectly have created many problems on the e-mail network. These problems have included extensive network traffic, slow downs, and even the loss of e-mail communications for several counties at a time. Because of this, extra caution must be taken during the configuration steps.

We will be examining two methods for configuring Extended Leave Messages (Simple Extended Leave Rule and Advanced Extended Leave Rule**)**.

Both require that the user initially configure the Rule (which only has to be done once) and modify the dates in the message each time it is used (Enabled).

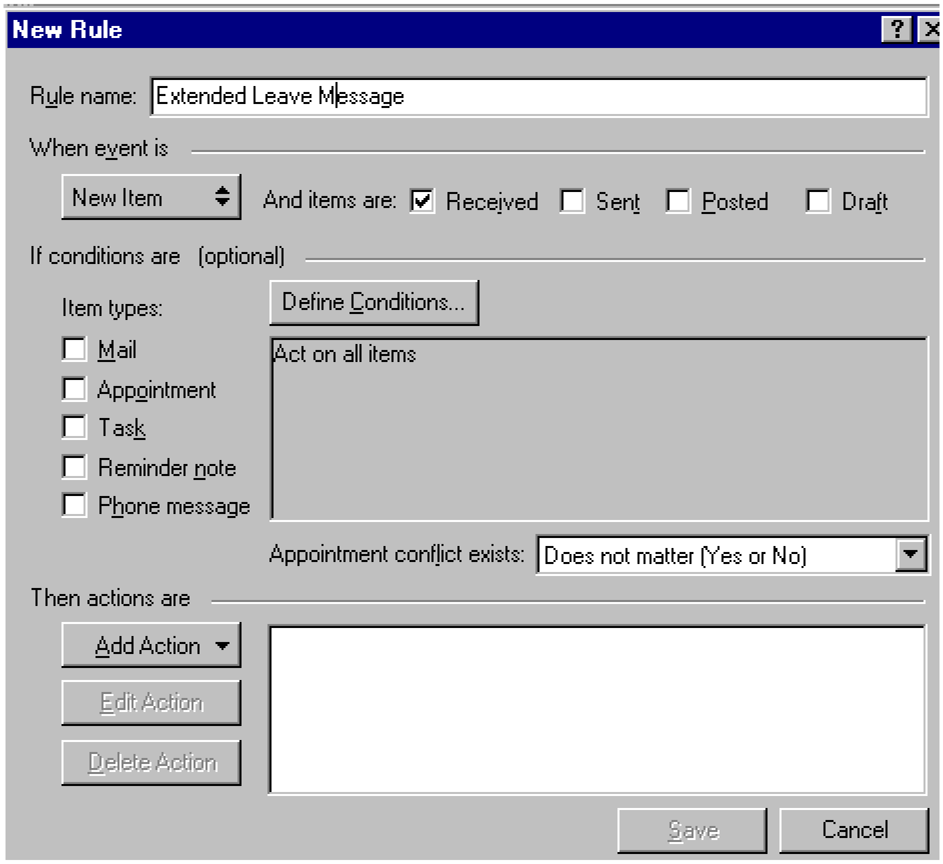
The biggest difference between these Rules is that the Simple version **must** be Enabled (turned on) prior to leaving the office and Disabled (turned off) upon returning. While the Advanced Rule can be edited ahead of time and it will Enable/Disable automatically.

Simple Extended Leave Rule with a Reply

Following the steps in this section will walk the user through the configuration of a **Simple** Extended Leave Rule.

From the Mailbox screen Menu Bar:

> Select **Tools | Rules | New** and click the **New** button in the Rules dialog box that appears. In the **Rule name:** type "Extended Leave Message" or an appropriate name (e.g. Out of Office, Vacation).


New Rule
?
When event is
If conditions are (optional)
Item types:
Define Conditions...
Then actions are
Add Action
Edit Action
Delete Action
Save
Cancel

Rule name: Extended Leave Message

New Item

And items are: ☑ Received ☐ Sent ☐ Posted ☐ Draft

☐ Mail
☐ Appointment
☐ Task
☐ Reminder note
☐ Phone message

Act on all items

Appointment conflict exists: Does not matter (Yes or No)

1. **When event is:** and **Item Type:**
   a) In the **When event is:** section, leave the **New Item** button set to New Item.
   b) In the **And items are:** check boxes, select **Received**.

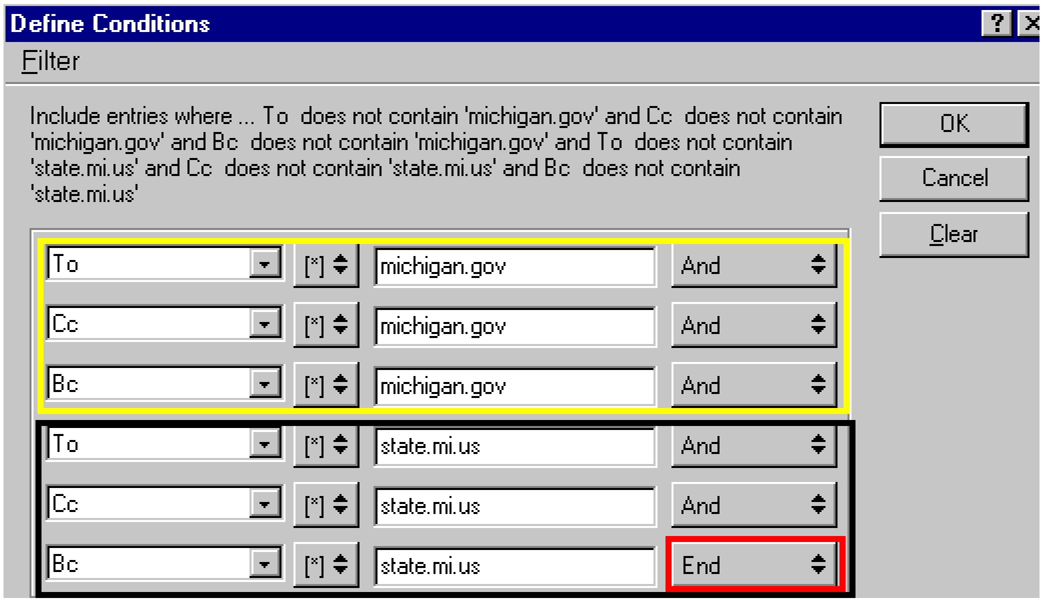
2. In the **If conditions are:** section:

   a) Leave all **Item types:** boxes unchecked. This will apply the Rule to **all** Item types by default.

Note: Some web sites outside the state's network have servers configured to automatically reply to messages they receive. This creates a loop that will overstress the state's e-mail servers. To keep this from creating a problem, the following **Defined Conditions must be set in every Extended Leave Message Rule**.

b) Click the **Defined Conditions** button. (This is were you will define the conditions that the Rule must follow.)

The finished Defined Conditions dialog box you will be building, should appear as below.



Include entries where ... To does not contain 'michigan.gov' and Cc does not contain 'michigan.gov' and Bc does not contain 'michigan.gov' and To does not contain 'state.mi.us' and Cc does not contain 'state.mi.us' and Bc does not contain 'state.mi.us'

To	[*]	michigan.gov	And
Cc	[*]	michigan.gov	And
Bc	[*]	michigan.gov	And
To	[*]	state.mi.us	And
Cc	[*]	state.mi.us	And
Bc	[*]	state.mi.us	End

Note that in the last line of the Defined Conditions, the End button is left as **End.**

c) Select the **Pick Arrow** in the top, left text field and select **To**.
(If the **To** selection is not available, select **All Fields …** and select from the list.)

d) Click the ⬍ button and select **[x] Does Not contain**.

e) In the next box type **michigan.gov**.

f) Click the End button and select **And**. (Another set of entry boxes and buttons should appear.)

g) Repeat Steps b - f, selecting **CC** and **BC** in the left side text field for the next two sets of entry boxes. (If the **CC** or **BC** selection is not available, select **All Fields …** and select from the list.)

Step h *will produce the last 3 lines as shown in the example above. It is necessary to include these lines until the state system stops accepting the state.mi.us addresses These lines are listed at the end of the Defined Conditions dialog screen making it easier to edit them at a later date.*

h) Repeat Steps b – g, entering **state.mi.us** in the right side text field.

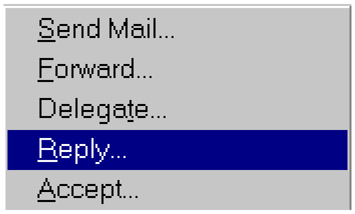
i) The last End button on the last Defined Condition line should remain as End.

j) Click **OK** to save and close.

k) The **Appointment conflict exists:** box does not require any changes.

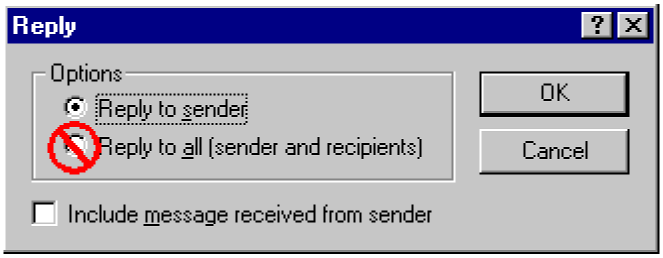
3. In the **Then actions are** section:

   a) Click the **Add Action** button and select the action that you want to apply. (In this case **Reply**).



   b) When the following Reply screen appears, verify that **Reply to sender** is selected.

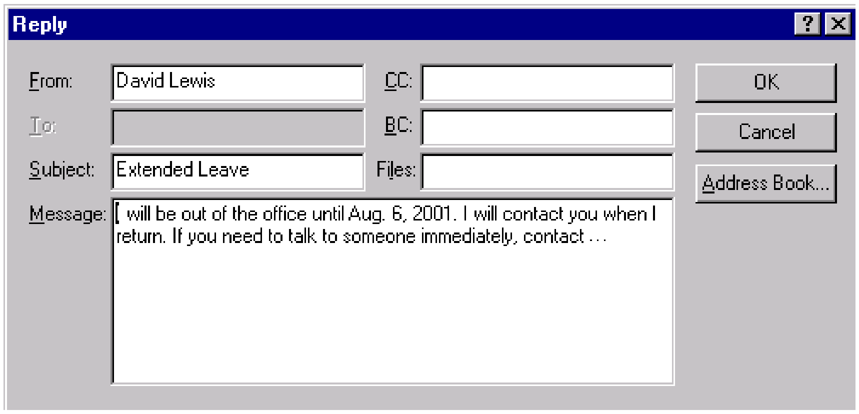
Note: DO NOT SELECT "Reply to all (sender and recipients)". This selection has caused problems with the e-mail system in the past.



Options
● Reply to sender
○ Reply to all (sender and recipients)
☐ Include message received from sender

   c) Click **OK** and a second **Reply** screen will appear.

   d) Type in the **Subject:** and the **Message:** to be sent as your Reply.



From: David Lewis
To:
CC:
BC:
Subject: Extended Leave
Files:
Message: I will be out of the office until Aug. 6, 2001. I will contact you when I return. If you need to talk to someone immediately, contact ...

   e) Click **OK | Save.**

   The Extended Message will be saved and activated.

To verify that the Rule is active, a check mark should appear in the box next to the message in the Rules dialog box. If the check box is empty, click in the box to place a check mark there.

   f) Click **Close**.

   Note: DO NOT TEST THIS RULE BY SENDING A MESSAGE TO YOURSELF. Sending a message to yourself could create a continuous loop similar to the "Reply to all senders" problem described above. Test the Rule by having another user send you a message from their e-mail account and check the response.

Enabling/Disabling the Simple Rule

Note: The steps required to create this Rule may seem rather long or complicated, but do not let that keep you from considering the Advanced version. The Advanced version is only a few extra steps and is easier to use. It does not require being Enabled and Disable each time, as the Simple version does.

Altering the Extended Leave Message

Altering the message for the next use requires altering the Reply message.

To alter the Reply message:

1. Select **Tools | Rules**.
2. Click (Highlight) the Extended Leave Message.
3. Select the **Edit** button.
4. Double-click the word **Reply** in the Then actions are: section.
5. Alter the date and /or message as needed.
6. Click **Save** and **Close.** .

To Enable or Disable the Simple Extended Message:

1. Select **Tools | Rules**.
2. Click the **Disable** / **Enable** key or double-click the check box next to the Rule name. (This will remove / place the check mark.)
3. Click **Close**.

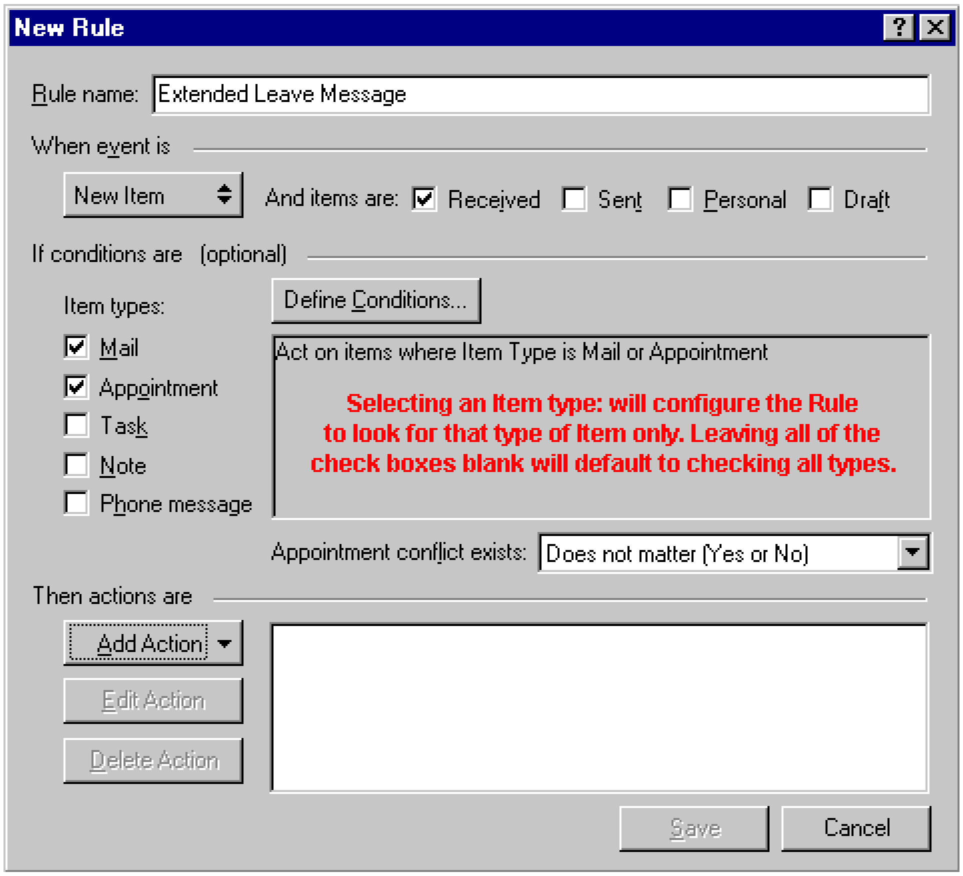
Note: When modifying a Rule, verify that a **check mark** is in the box next to the Rule's name or else the Rule will not be activated.

Advanced Extended Leave Message with a Reply

Following the steps in this section will walk the user through the configuration of an **Advanced** Extended Leave Message. These steps are more involved than the Simple version, but remember that the Rule must only has to be performed once. From then on, the user only has to modify the dates and message as needed. The Rule will automatically Enable and Disable itself on the specified dates.

From the Mailbox screen Menu Bar.

Select **Tools | Rules | New** and click the **New** button in the Rules dialog box that appears. In the **Rule name:** type "Extended Leave Message" or an appropriate name (e.g. Out of Office, Vacation).



Rule name: Extended Leave Message

New Item   And items are: ☑ Received ☐ Sent ☐ Personal ☐ Draft

Item types:

☑ Mail
☑ Appointment
☐ Task
☐ Note
☐ Phone message

Act on items where Item Type is Mail or Appointment

Selecting an Item type: will configure the Rule to look for that type of Item only. Leaving all of the check boxes blank will default to checking all types.

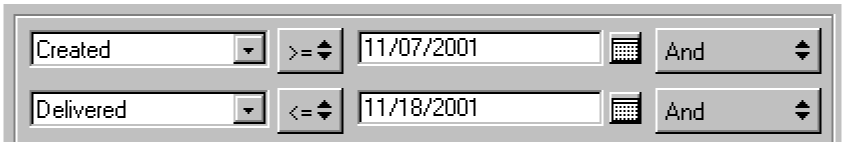
Appointment conflict exists: Does not matter (Yes or No)

1. **When event is:**
    a. In the **When event is:** section, leave the **New Item** button set to New Item.
    b. In **And items are:** leave all of the boxes unchecked. This will apply the Rule to **all** Item types by default.

2. In the **If conditions are:** section:

   a. Click the **Defined Conditions** button. (This is where you will define the conditions that the Rule must follow.)

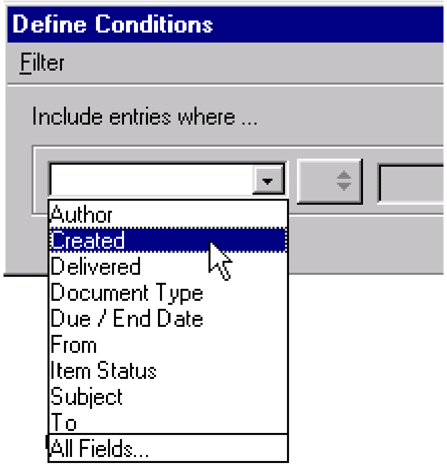
   The first 2 lines of the Defined Conditions dialog box **you will be building** will appear as below.



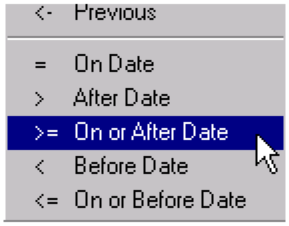
Created >= 11/07/2001 And

Delivered <= 11/18/2001 And

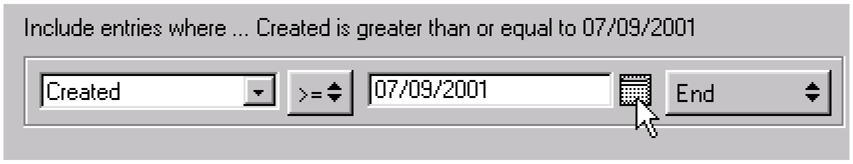
   b. Under **Include entries where…** click the **pick arrow** next to the left box and select **Created.**


Define Conditions
Filter
Include entries where ...
Author
Created
Delivered
Document Type
Due / End Date
From
Item Status
Subject
To
All Fields...

   b. Click the button and select **>= On or After Date.**


<- Previous
= On Date
> After Date
>= On or After Date
< Before Date
<= On or Before Date

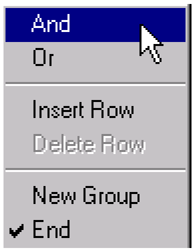
   c. Click the **Calendar** button, and double-click **the first day you** will be out of the office.

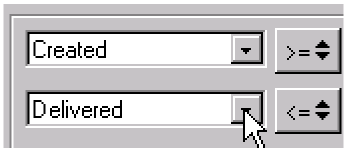


Include entries where ... Created is greater than or equal to 07/09/2001

Created >= 07/09/2001 End

   d. Click the **End** button and select **And**.


And
Or
Insert Row
Delete Row
New Group
✓ End

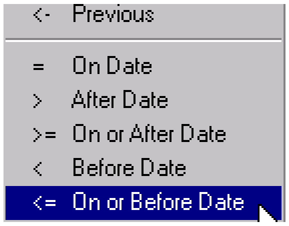


Created >=

Delivered <=

   e. On the second line, in the first box click the **pick arrow** and select **Delivered**.

   f. Click the and select **<= On or Before Date**.


<- Previous
= On Date
> After Date
>= On or After Date
< Before Date
<= On or Before Date

   g. Click the Calendar button and double-click the last day you will be out of the office.

   h) Click the End button and select **And**.

Note: Some web sites outside the state's network have servers configured to automatically reply to messages they receive. This creates a loop that will overstress the state's e-mail servers. To keep this from creating a problem, the following Defined Conditions **must be set in every Extended Leave Message Rule.**

j) Select the **Pick Arrow** in the left text field and select **To**.

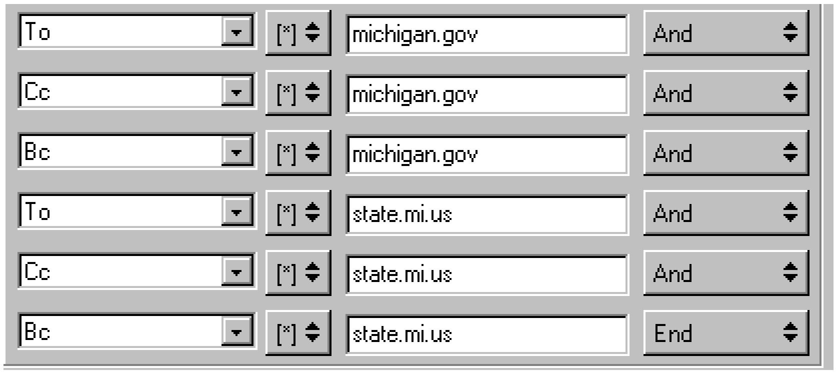
k) Click the ⬍ button and select **[x] Does Not contain**.

l) In the next box type **michigan.gov**.

m) Click the End button and select **And**. (Another set of entry boxes and buttons should appear.)

n) Repeat Steps j - m, selecting **CC** and **BC** in the left side text field for the next two sets of entry boxes as in the example.

Steps j – o will produce the last 7 lines of the Defined Conditions dialog box as it appears below.



To	[*]	michigan.gov	And
Cc	[*]	michigan.gov	And
Bc	[*]	michigan.gov	And
To	[*]	state.mi.us	And
Cc	[*]	state.mi.us	And
Bc	[*]	state.mi.us	End

*Step **o** will produce the last 3 lines as shown above. It is necessary to include these lines until the state system stops accepting the state.mi.us addresses These lines are listed at the end of the Defined Conditions dialog screen to make editing easier at a later date.*

o) Repeat Steps j – n, entering **state.mi.us** in the right side text field as in the example above.

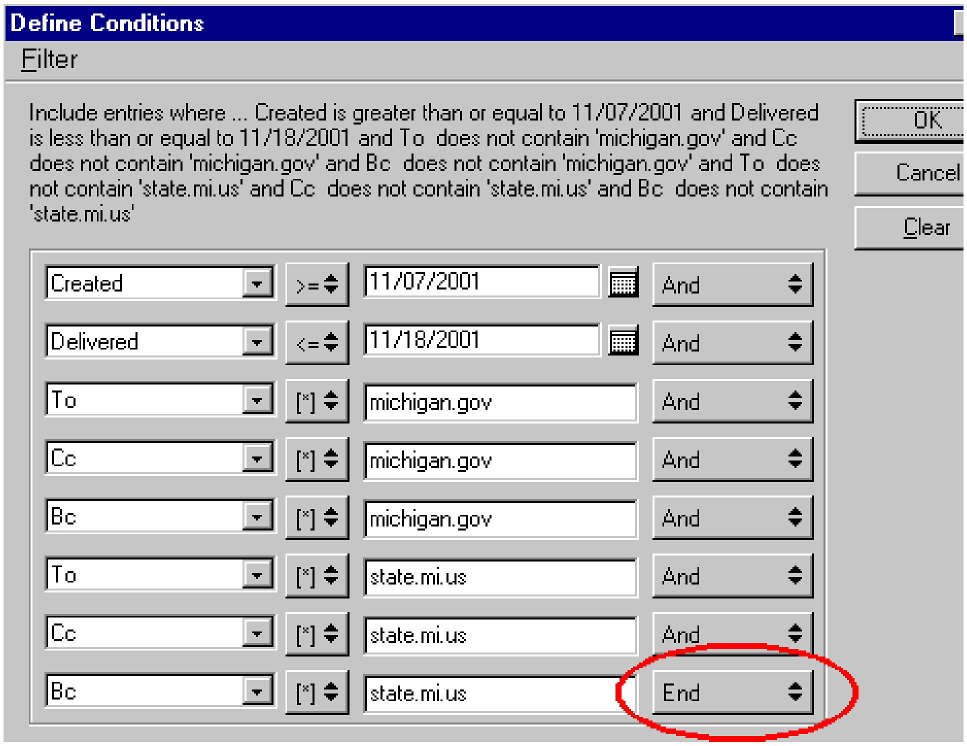
p) The last **End** button on the last Defined Condition line should remain as **End**.

The finished Defined Condition dialog box should appear the same as in this example. The dates may vary.

Note that in the last line of the Defined Conditions, the End button is left as **End**.

q) Click **Ok** to save.

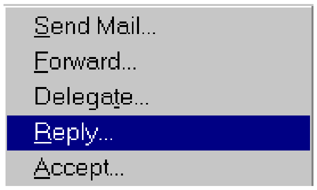
r) The **Appointment conflict exists:** box does not require any changes.



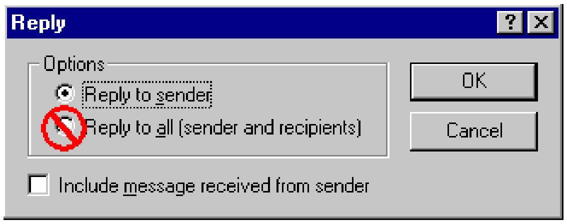
Include entries where ... Created is greater than or equal to 11/07/2001 and Delivered is less than or equal to 11/18/2001 and To does not contain 'michigan.gov' and Cc does not contain 'michigan.gov' and Bc does not contain 'michigan.gov' and To does not contain 'state.mi.us' and Cc does not contain 'state.mi.us' and Bc does not contain 'state.mi.us'

Created	>=	11/07/2001	And
Delivered	<=	11/18/2001	And
To	[*]	michigan.gov	And
Cc	[*]	michigan.gov	And
Bc	[*]	michigan.gov	And
To	[*]	state.mi.us	And
Cc	[*]	state.mi.us	And
Bc	[*]	state.mi.us	End

3. In the **Then actions are:** section.
   a) Click the **Add Action** button and select the action that you want to apply. (In this case **Reply**).



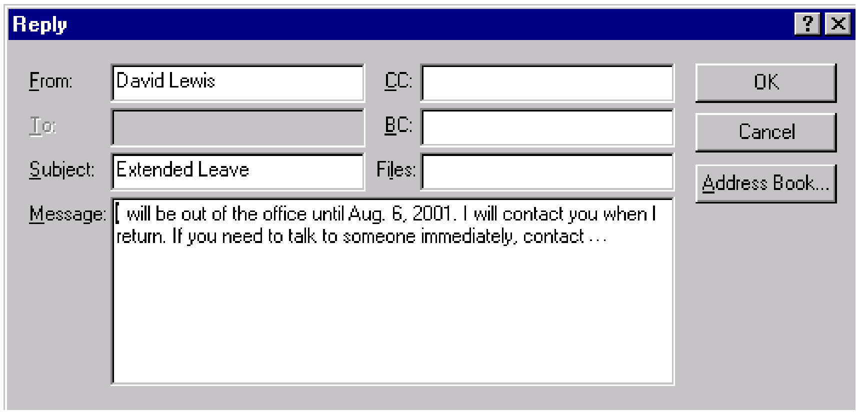
   b) When the following Reply screen appears, verify that **Reply to sender** has been selected.



Options
● Reply to sender
○ Reply to all (sender and recipients)
☐ Include message received from sender

Note: DO NOT SELECT "Reply to all senders and recipients)". This selection has caused problems with the e-mail system in the past.

   c) Click **OK** and a second **Reply** screen will appear.



From: David Lewis
To:
Subject: Extended Leave
CC:
BC:
Files:
Message: I will be out of the office until Aug. 6, 2001. I will contact you when I return. If you need to talk to someone immediately, contact ...

   d) Type in the **Subject:** and the **Message:** to be sent.
   e) Click **OK | Save.** The Extended Message will be saved and automatically activate. (A check should appear next to the message in the Rules dialog box.
   f) Verify that there is a check mark in the check box next to the Rule's name.
   g) Click **Close**.

Editing the Advanced Extended Leave Message

To prepare the rule for re-use, alter the dates in the Defined Conditions and the Reply message.

To alter the Extended Message Rule:

1. Select **Tools | Rules**.
2. Single-click (Highlight) the **Extended Leave Message** name.
3. Click the **Edit** button.
4. Click the **Define Conditions...** button.
5. Click the **Calendar** button in the top condition line, double-click the **new date for the first day** you will be out of the office.
6. Click the **Calendar** button in the second conditions line, double-click the **new date for the last day** you will be out of the office (the day before you return).
7. Click **OK**.
8. Double-click the word **Reply** in the Then actions are: section.
9. Alter the date and /or message as needed, click **Save | Close.**

Enabling and Disabling the Advanced Extended Leave Message:

Configuring the dates in the Defined Conditions of the Rule allows the user to establish this Rule ahead of time. The Rule will Enable itself on the specified date.

To disable the Rule:

1. Select **Tools | Rules** from the Menu bar.
2. Click the **Disable** / **Enable** key or double-click the check box next to the Rule name. (This will remove / place the check mark.)
3. Click the **Close** button.

Note: When modifying a Rule, verify that a **check mark** is in the box next to the Rule's name. If the check mark is not in the check box, the Rule will not be activated.